

Is Your Company Ready for AI?

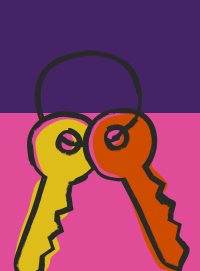
A Practical Checklist for Microsoft Copilot

Getting started with Copilot is simple! Use this checklist to ensure a smooth and successful implementation from day one.



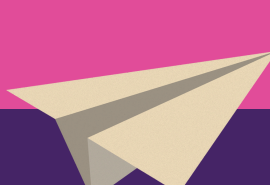
01 Validate Requirements

- ✓ Ensure every user has a **Microsoft account** (Entra ID)
- ✓ **Install** Microsoft 365 Apps
- ✓ **Assign** each user a Copilot license
- ✓ Stay updated with the latest monthly **updates**
- ✓ Store **content** in Microsoft 365 or make it accessible via Microsoft Graph connectors



02 Ensure User Access

- ✓ **Activate OneDrive** accounts
- ✓ **Enable** the new **Outlook** experience
- ✓ Turn on **Loop** in the Microsoft Admin Center
- ✓ Enable **Whiteboard** in the Admin Center



03 Strategy & Goals

- ✓ **Where can AI add value?** Start small - find a **low risk** use case to demonstrate the value
- ✓ Define **clear organisational goals and objectives** and align them to AI implementation
- ✓ Do you have an **AI policy and vision statement?**



04 Streamline sharepoint permissions and set governance

- ✓ Review and manage access permissions.
- ✓ Establish clear rules for managing data.
- ✓ Protect sensitive information by identifying it, securing it, and tracking its location.



05 Team Readiness

- ✓ Engage the team early to build **buy-in** and highlight AI's role in their work
- ✓ Address **job security concerns**
- ✓ Define AI's place in **daily workflows**
- ✓ Align team roles with **new responsibilities**
- ✓ Provide **targeted** AI training
- ✓ **Celebrate wins** and acknowledge efforts



06 Infrastructure Preparation

- ✓ **Optimise** your Microsoft 365 for AI tools.
- ✓ Have you set up **sensitivity labels and retention policies?**
- ✓ Apply structured **change management** to ease the transition



07 Adoption & Training

- ✓ Develop a **communication and training** plan for your employees
- ✓ Host **workshops** to explore AI possibilities.
- ✓ Are you tracking **adoption metrics**, like **Copilot Adoption Score** or “**Art of the Possible**” sessions?



08 Monitor & Iterate

- ✓ Collect **feedback** on AI tools and processes
- ✓ Adjust **strategies** based on team input and business outcomes

Start your Copilot journey with confidence!

Follow these best practices to boost productivity and innovation. Ready to transform your organisation?

Contact us today!